



SENIOR & LONG TERM CARE DIVISION COMMUNITY SERVICES BUREAU

HOME AND COMMUNITY BASED WAIVER Policy Manual

Section: SERVICES

Subject: Independence Advisor

References: ARM: 37.40.1424

DEFINITION

Independence Advisor (IA) services include an array of member-directed support activities to ensure the ability of consumers to direct their care successfully. Members can choose from any qualified and enrolled provider. This is a mandatory service for all member-directed BSB option waiver participants.

COVERED SERVICES

An IA can help members or their personal representatives:

1. learn how to successfully self-direct services;
2. develop a person-centered Support and Services Spending Plan(SSSP);
3. access waiver services, Medicaid state plan services, and other needed medical, social or educational services regardless of funding source;
4. develop, implement, and monitor a monthly spending plan;
5. identify risks and develop a plan to manage those risks;
6. develop an individualized emergency backup plan;
7. make allowable purchases and ensure that those purchases are listed in the spending plan;
8. negotiate payments for necessary and allowable goods and services;
9. work with the Financial Manager (FM) to track expenditures;
10. monitor the provision of the services to ensure the member's health and welfare; and
11. coordinate with the FM to ensure that members or personal representatives budget appropriately to meet their needs as defined in the SSSP.

REQUIREMENT

An IA agency must complete the Community Services Bureau (CSB) mandatory training, pass a certification interview and receive formal certification as an IA agency before providing services.

Training topics include:

1. person-centered planning process;
2. principles of member-direction;
3. developing a comprehensive SSSP;
4. Department program policy and processes;
5. Program reporting and documentation requirements;
6. Community resources; and
7. Techniques to enhance member-directing skills for members.

A certified IA agency must also exhibit a professional commitment to the described duties and successfully demonstrate the ability to:

1. understand the principles of member direction, IA and member roles, state and federal program policies, and local, regional, state and federal resources;
2. follow written and verbal instructions;
3. communicate successfully with members, personal representatives and Financial Managers (FMs);
4. participate on the member's support team;
5. establish community networks;
6. recognize and report abuse, neglect and exploitation;
7. comply with CSB Serious Occurrence Reporting and other policies;
8. advocate on the behalf of members and teach self-advocacy;
9. assist with developing an appropriate and comprehensive SSSP that includes Medicaid, traditional and member-directed services;
10. instruct, counsel and guide members in problem solving and decision making; and
11. comply with program reporting and documentation requirements.

LIMITATIONS

This service is only available to members participating in the BSB option.